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TRAINING INTRODUCTION

Background

The Housing Authority of the City of High Point (HPHA) requested that PricewaterhouseCoopers (PwC) develop a training for its caseworkers, as part of its Moving to Work (MTW) program. In response to this request, PwC developed a caseworker training, based on the needs and desires of management and staff.

The three primary goals of the training are to:

- Enhance specific case management skills and practices of the MTW/FSS caseworkers
- Increase staff understanding of HPHA's work as a holistic system, particularly in regard to the MTW/FSS program
- Improve communication and collaboration processes between HPHA staff in different departments

This training will take place on March 15 and 16, 2001. The first day of the training addresses the first training goal to develop and enhance the case management skills of the MTW/FSS caseworkers. The second day addresses the second and third goals: to improve interdepartmental communication and to increase the staff's understanding of the holistic nature of HPHA's work.

The MTW/FSS caseworkers comprise the core training audience, who will participate in every session of the training. Joining the training on the second day will be the Director of Management, the Director of Economic Development, and staff from the Departments of Management and Assisted Housing.

How to Use This Guide

This Participant Guide contains information on each training session and contains all of the worksheets and handouts necessary to complete the activities. This guide will allow you to follow along with the trainers as they move through the various exercises and discussions. We encourage you to take notes if doing so will help you remember important information. This guide includes blank pages for note taking in each section. We have also included reference materials for your use after completion of the training and a training evaluation form, which we ask you to complete once you have finished the training. Should you have any questions or comments about the information in this guide, please feel free to speak with your trainer.

Training Agenda

Thursday - March 15

Participants: MTW/FSS Caseworkers

| Time | Activity |
|---------------|--|
| 8:45 - 9:05 | Welcome and Introductions |
| 9:05 - 9:50 | Session 1: Talking about Self Sufficiency - Forming a Team Vision |
| 9:50 - 10:35 | Session 2: Case Assessment Overview |
| 10:35 - 10:50 | Break |
| 10:50 - 12:10 | Session 3: Case Assessment - Talking with Clients about Internal Resources |
| 12:10 - 1:10 | Lunch |
| 1:10 - 2:30 | Session 4: Case Assessment - Talking with Clients about Internal Barriers |
| 2:30 - 2:45 | Break |
| 2:45 - 3:45 | Session 5: Introduction to Goal Setting |
| 3:45 - 5:00 | Discussion and Wrap-up |

Friday - March 16

Participants: MTW/FSS Caseworkers, Director of Economic Development, Director of Management, Staff from Departments of Assisted Housing and Management

| Time | Activity |
|---------------|--|
| 8:45 - 9:05 | Welcome and Introduction |
| 9:05 - 10:30 | Session 6: FSS/MTW Overview and Small Group Breakout |
| 10:30 - 10:45 | Break |
| 10:45 - 11:30 | Session 7: Self Sufficiency Mapping Exercise |
| 11:30 - | Session 8: Work Stories Activity |

| | |
|------------------|--------------------------------------|
| 12:00 | |
| 12:00 - 12:15 | Large Group Summary and Wrap Up |
| 12:15 - 12:45 | Final Wrap Up with Core Participants |

Training Questions

Throughout the next two days, we will ask you to answer key questions about your efforts to assist residents gain self sufficiency by drawing from your own experiences and lessons learned. We have divided these questions into three categories, as outlined below:

Questions Regarding Work of Caseworkers

A useful image to convey the complexity and collaborative nature of FSS/MTW casework is that of a journey towards a goal. We incorporate this image into the training to provide a framework for skill development and issue identification. We define the goal of this journey as "Success in Self Sufficiency" and we ask you to address the following questions:

- *What does success in self sufficiency look like in our casework practices?*
- *What are we doing that contributes to that success?*
- *What are the clients doing that contributes to their success?*

Through your responses to these questions, we derive lists of skills you and your colleagues require to perform your jobs. We ask you to answer these questions using specific examples and stories from your work. These stories will provide a context for subsequent training sessions and serve as a useful starting point to develop concrete case management skills.

Questions Regarding Client Success

The journey metaphor for self sufficiency work continues, as we switch our focus from the caseworker to the client. To address clients' efforts to reach self sufficiency, we ask the following questions:

- *What helps our clients to be successful?*
- *What gets in the way of our clients' success?*

To answer these questions, we examine what clients need to access all the resources that are available to them. In particular, we focus on how clients discover their own inner resources that keep them motivated. We also examine how

clients overcome their barriers to self sufficiency, including those that are part of their life circumstances and the inner barriers that hinder their prospects for success.

After we address these questions and train you to access resources and identify barriers to self sufficiency, we ask a final question:

- *How do we make success in self sufficiency a compelling goal for our clients?*

We address this question by examining the goal formation process and analyze how it is predictive of success or failure. We will train you to help your clients develop useful and meaningful goals that are realistic, measurable, and relevant to the pursuit of self sufficiency.

Questions Regarding Staff Support of Self Sufficiency Work

To address the holistic nature of HPHA's work, we focus on how staff in different HPHA departments collaborate in the authority's self sufficiency work. At this stage of the training, we involve the larger group of participants and address the following questions:

- *How do we already work as a team to help clients achieve success in self sufficiency?*
- *How can we work better as a team to ensure greater client success in achieving self sufficiency?*

We continue to use the motif of a journey as an organizing training metaphor to address these questions through staff discussion and collaborative exercises. This adds consistency to the training and allows us to wrap up the final session in a logical fashion with closure.

Training Sessions - Day One

| |
|---|
| <p>Welcome and Introduction (8:45 - 9:05)</p> |
|---|

Introduction:

During this session, we provide a brief, general overview of the discussions, activities, and lectures that will take place over the course of the next two days. We will define the course objectives and outline the training agenda.

Session Activities:

- Introductions
- Presentation of Training Goals
- Outline of Training Agenda

Notes:

| |
|--|
| <p>Session 1: Talking about Self Sufficiency - Forming a Team Vision (9:05 - 9:50)</p> |
|--|

Introduction:

In this session, we will facilitate discussion on successful casework. First, we ask you to share a personal work experience that you feel highlights a positive outcome from HPHA's self sufficiency work. We will then use these stories to generate ideas about the factors that determine success within the MTW/FSS program. We will record these elements of success, for both client and caseworkers, to inform subsequent training sessions.

By using your stories to frame this session, we identify effective and relevant strategies to help clients and ensure that the training reflects your practices and daily realities. The purpose of this session is not to lecture to you, but to have you discuss important aspects of your work with our guidance. Through discussion of your work stories, we hope to strengthen your sense of working together as a team, united by a common set of goals. Finally, by sharing stories of success, rather than stories of conflict or "war stories," we aim to help you place your work in a positive and constructive context.

Goal: Increase staff understanding of HPHA's work as a holistic system, particularly in regards to the MTW/FSS program.

Objectives:

Upon completion of this section, you will be able to:

- Describe the team's conception of what is successful self sufficiency casework and what makes it more likely to occur.
- Describe at least three elements of success in the caseworker.
- Describe at least three elements of success in the client.

Session Activities:

- Participants tell a story about a successful MTW/FSS case
- Group discusses stories, while trainers record information on flip chart
- Debrief session

Notes:

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Session 2: Case Assessment Overview – What Clients Need to be Successful
(9:50 – 10:35)

Introduction:

We know that self sufficiency means that clients finally take control of their lives. In the beginning, that means finding the right resources in the community to assist with employment, schooling, jobs and childcare needs. However, as the journey to self sufficiency advances, clients need to appreciate their own inner power to manage their future. We introduce the concept of case assessment in this session as a method to discover the resources that clients need to be ultimately successful.

We also describe assessment as a means to identify the barriers that put success at risk. Often these barriers can be circumstances outside the control of the client. But the journey to self sufficiency means targeting those resources and barriers over which the client has some control. Identification of these resources and barriers is crucial to the success of the client.

Goal: To enhance your case management skills and practices

Objectives:

Upon completion of this section, you will be able to:

- Describe the four areas of case assessment.
- Describe the benefits of a holistic approach to case assessment and use a simple checklist to track the use of this approach.

Session Activities:

- Overview of Case Assessment
- Group Discussion on Case Assessment
- *Four Domains of Case Assessment Exercise*
- *Is My Assessment Holistic Exercise*

THE FOUR DOMAINS OF CASE ASSESSMENT

Session 2: Case Assessment Overview – What Clients Need to be Successful

Instructions:

Use this chart to identify examples of the internal and external resources and barriers from your own experiences as a caseworker. We will facilitate discussion on these topics and show how these domains relate to your self sufficiency work.

| SUPPORTS AND STRENGTHS | NEEDS AND DEMANDS |
|---|--|
| External Resources Persons or organizations that provide goods and services to help individuals and families maintain a reasonable quality of life. <i>Examples:</i> <ul style="list-style-type: none">▪ <i>Extended family</i>▪ <i>Neighbors</i>▪ <i>Agencies, institutions</i>▪ <i>Support groups</i> | External Barriers Deficiencies in the client's environment such that needed help is not available. <i>Examples:</i> <ul style="list-style-type: none">▪ <i>Service or resource not available</i>▪ <i>Inadequate programs</i>▪ <i>Ineligibility of client for service or programs</i>▪ <i>Client inability to connect with resource</i> |

| | |
|--|--|
| <p>Internal Resources</p> <p>Personal strengths, beliefs, values, skills that motivate a person to seek, accept and use assistance.</p> | <p>Internal Barriers</p> <ul style="list-style-type: none"> ▪ Beliefs, attitudes or values held that lead to patterns of behavior that interfere with seeking or accepting help. ▪ Inherent incapacities outside the client's control (ex. health, mental health, substance abuse). |
|--|--|

Following are areas commonly explored in comprehensive case management to assess the four domains:

- Financial resources
- Transportation
- Food and nutrition
- Use of health services for adults
- Family planning and sexual responsibility
- Child care
- Support system (as defined by client)
- Vocational functioning or readiness
- Parenting
- Housing and safety
- Clothing and household management
- Use of health services for children
- Disabilities (mental, physical, learning)
- Child development
- Educational needs
- Legal issues
- Substance abuse (self and others)
- Domestic Violence (children and adults)

IS MY ASSESSMENT HOLISTIC?

Session 2: Case Assessment Overview – What Clients Need to be Successful

Instructions:

Think about past client engagements and use this checklist to determine if your client assessments have been holistic. If you are unable to check certain boxes, think about how you could have modified or changed your approach to make your assessment holistic. Discuss your thoughts with your fellow caseworkers.

Holistic - Concerned with wholes or with complete systems rather than with the analysis of, treatment of, or dissection into parts

My assessment is holistic if it examines:

- ☐ The skills the individual needs to secure a job or access the vocational training needed to develop job skills.
- ☐ The jobs currently available in the local labor market, wages, and opportunities for advancement.
- ☐ Additional training or post-secondary education needed to advance to jobs promote permanent financial independence.
- ☐ Other factors that impede a person's chances for financial self-sufficiency, such as domestic violence, alcoholism or drug addiction, children with severe behavioral problems, and criminal records.
- ☐ Securing services needed to overcome those broader problems.

Session 2: Case Assessment Overview - What Clients Need to be Successful

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Session 3: Case Assessment - Talking about Internal Resources
What Helps our Clients be Successful?
(10:50 - 12:10)

Introduction:

Clients who set out to become economically independent need to understand that their ability to take advantage of external resources depends on their motivation, or, in other words, their internal resources. While external resources like childcare are visible and accessible, inner resources are not. In this section of the training, you will learn how to make inner resources visible and practice an interview technique that makes these resources more available and ultimately more powerful, as the client continues on the path to self sufficiency.

Goal: Enhance the case management skills and practices of the MTW/FSS caseworkers.

Objectives:

Upon completion of this section, you will be able to:

- Describe the concept of an internal resource.
- Interview clients about their internal resources.
- Help a client develop at least one strategy to strengthen an inner resource.

Session Activities:

- Introduction to Internal Resources
- Group Discussion - "What are Internal Resources"
- *Naming an Internal Resource* Exercise
- *Interviewing about an Internal Resource* Exercise
- Group Discussion
- Practice Interviews with the Group
- Summary Discussion

NAMING AN INTERNAL RESOURCE

Session 3: Case Assessment - Talking about Internal Resources

Instructions:

Using this handout, identify one or more of your own internal resources and describe how this resource has affected your life. The purpose of this exercise is to expose you to the type of questions that case managers commonly use to get clients to talk about their internal resources and sources of motivation.

When assessing a client's internal resources, it is important to examine the individual's strengths, values, and skills that contribute to their success. Questions to ascertain internal resources include:

- ? What quality do you most like about yourself?
- ? What perspective keeps you going when you are discouraged?
- ? When you are facing difficult challenges, what enables you to persevere?
- ? What personal value do you hold highly?
- ? What motivates you to improve your circumstances?
- ? What personal strength of yours have others noticed?
- ? Of the internal resources that you have mentioned, which is the most influential in your work toward self-sufficiency?

INTERVIEWING ABOUT AN INTERNAL RESOURCE

Session 3: Case Assessment - Talking about Internal Resources

Instructions:

Interview a co-worker on her internal resource(s). The purpose of this interview is to explore the history and origins of internal resources, as well as how clients can use these resources to combat problems and achieve goals. This exercise will expose you to an interviewing technique that you can use to motivate your clients to be proactive in their efforts to become self sufficient.

Think of a personal strength, value, or belief that gets you through hard times and phrase it as one word, a **noun**. Fill in the blanks below with that one word and answer the following questions.

The history of _____ in your life

- ? When did you first notice it?
- ? What were some early instances of its presence?
- ? Which people in your life are connected to it?
- ? Who else in your past or present knows about it?

The origins of _____ in your life

- ? Who before you also had it?
- ? Where and how do you think they acquired it?
- ? What traditions, beliefs, or experiences started it in your life?

The future of _____ in your life

- ? If you more fully used it, how would it affect your life?
- ? How would it affect your relationships?
- ? How would it affect your hopes for the future?
- ? Name three ways that you can use it to help you meet your self sufficiency goals.

Tell a story about how _____ has added to or enriched your life and your relationships.

Session 3: Case Assessment - Talking about Internal Resources

What Helps our Clients be Successful?

Notes:

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Session 4: Talking about Internal Barriers
What Prevents our Clients from Being Successful?
(1:10 - 2:30)

Introduction:

Just as inner resources are invisible, so too are the inner obstacles that people form from past experiences. Pessimism and cynicism generally lead to repeated failure, which can make some clients view failure as normal. Caseworkers need a mechanism to understand and uproot these obstructive attitudes and to counter their effects.

In this session, you will learn how to disarm these internal barriers by treating them as separate from the client, who desires to be self-sufficient. Through an interview technique, you will learn to help clients realize that their problems are not rooted in who they are as people. Treating people as the problem only hinders their ability to deal effectively with their obstacles and prevents them from accessing their inner resources. A useful phrase to describe the need to disconnect the problem from the person is, "People are not the problem. The problem is the problem."

Goal: Enhance the case management skills and practices of the MTW/FSS caseworkers.

Objectives:

Upon completion of this section, participants will be able to:

- Develop a clear understanding of why many clients do not make use of available resources.
- Name at least four recognizable internal barriers to self sufficiency.
- Interview clients about their internal barriers to self sufficiency.
- Help a client develop at least one "anti-barrier" strategy.

Session Activities:

- Introduction to Internal Barriers

- Discussion about Generalization using the following handouts:

Internal Barrier - A Cynicism Story

Internal Barrier - A Pessimism Story

Internal Barrier - A Fatalism Story

Internal Barrier - A Criticism Story

- Sample Interview between Trainer and Participant Volunteer
- Debrief Session
- Interview Practice Session using *Interviewing a Person about a Problem* handout
- Summary Wrap Up and Discussion

INTERNAL BARRIER - A PESSIMISM STORY

Session 4: Talking about Internal Barriers

Instructions:

This handout describes a scenario in which the internal barrier of Pessimism affects a client. Review this scenario to engage in discussions on how internal barriers prevent clients from achieving their goals.

How Pessimism Affects My Life

"I am a person who has been constantly frustrated in achieving goals in life. I also received many messages from important people in my life that I am basically unlovable. I may have been abused as a child. I certainly was emotionally neglected."

Conclusion - What Pessimism Wants Me to Believe about Myself and the World

"No matter what I do, no matter how hard I try, something always goes wrong. I am ineffective, helpless and worthless. My problems are so great that they could never be solved even if someone were willing to help. However, I am of so little value that no one would want to help. There is no point in asking for help, as I will only be further frustrated. The future will be no different. Life is futile."

Characteristic Feeling States - What Pessimism Incites Me to Feel

Depression, apathy, futility, hopelessness

Behavior Patterns- - How Pessimism is Able to Convince Me to Act

Dependency, helplessness, withdrawal

Based on Ballew & Mink, *Case Management in Social Work: Developing the Professional Skills Needed For Work With Multiproblem Clients* 1996. Charles C. Thomas, Springfield IL. pp. 114-115

INTERNAL BARRIER - A CRITICISM STORY

Session 4: Talking about Internal Barriers

Instructions:

This handout describes a scenario in which the internal barrier of Criticism affects a client. Review this scenario to engage in discussions on how internal barriers prevent clients from achieving their goals.

How Criticism Affects My Life

"I have experienced a great deal of frustration and failure. I have received messages that I am valued, but they have not been enough to allow me to feel completely comfortable about myself. I experienced enough of criticism's attacks to be very sensitive to it but I have enough strength to try to deflect them. I come from a family in which one parent was critical and one was supportive. I can tell many stories about being unfairly blamed for things and being misunderstood by other people."

Conclusion - What Criticism Wants Me to Believe about Myself and the World

"All my life I have failed or been unfairly blamed for failures. Now that I'm grown, I don't have to take it any more. I have learned that it is less painful to put responsibility and blame onto others than to accept it myself. I act as though other people need help more than I do. Life is rotten."

Characteristic Feeling States - What Criticism Incites Me to Feel

Depression, Apathy, Anger, Failure

Behavior Patterns - How Criticism is Able to Convince Me to Act

Blaming, aggressiveness, defensiveness, fault-finding

Based on Ballew & Mink, *Case Management in Social Work: Developing the Professional Skills Needed For Work With Multiproblem Clients* 1996. Charles C. Thomas, Springfield IL. p. 115

INTERNAL BARRIER - A CYNICISM STORY

Session 4: Talking about Internal Barriers

Instructions:

This handout describes a scenario in which the internal barrier of Cynicism affects a client. Review this scenario to engage in discussions on how internal barriers prevent clients from achieving their goals.

How Cynicism Affects My Life

"My life stories are ones of betrayal. I was seduced and abandoned in many ways. I have experienced many disappointments and learned not to expect much from other people. I did experience my own strength, however. Mistrust of others, combined with a little confidence in myself, has led me to act very self sufficient. I felt like an outsider in my own family and was kept at some emotional distance from my parents."

Conclusion - What Cynicism wants me to believe about myself and the world

"I can't trust other people to take care of me. They will use my vulnerability to hurt me, If I build a wall around myself, then they can't hurt me. I have to act as though I'm entirely self sufficient and have everything under control. I have to

hide my need for help so no one can use it against me. I don't ask for help so I can't be disappointed. Life is so lonely."

Characteristic Feeling States - What Cynicism Incites Me to Feel

Loneliness

Behavior Patterns - How Cynicism is Able to Convince Me to Act

Control, Over-Independence, Distancing, Aloofness, Denial

Based on Ballew & Mink, *Case Management in Social Work: Developing the Professional Skills Needed For Work With Multiproblem Clients* 1996. Charles C. Thomas, Springfield IL. p. 116

INTERNAL BARRIER - A FATALISM STORY

Session 4: Talking about Internal Barriers

Instructions:

This handout describes a scenario in which the internal barrier of Fatalism affects a client. Review this scenario to engage in discussions on how internal barriers prevent clients from achieving their goals.

How Fatalism Affects my Life

"I had a very unstable life as a child. Relationships were short-lived and unpredictable. Important events were not explained, giving me the impression that things just happen for no reason. I was alternately indulged and punished according to the whims of my parents and with no relation to my behavior. I remember my childhood as being both good and bad but always with an underlying fearfulness."

Conclusion - What Fatalism Wants Me to Believe about Myself and the World

"Life is chaotic. I am entirely in the hands of fate and have no control over the future. There is no point in making plans. I can only react as new situations develop. I enjoy the good times when I can. When problems occur, I ignore them for as long as I can and hope they'll go away. It is impossible to anticipate problems, so there is no point asking for help. Life is unpredictable."

Characteristic feeling state - What Fatalism Incites Me to Feel

Anxiety

Behavior Patterns - How Fatalism is Able to Convince Me to Act

Impulsiveness, Disorganization, Recurring crisis, Poor planning

Based on Ballew & Mink, *Case Management in Social Work: Developing the Professional Skills Needed For Work With Multiproblem Clients* 1996. Charles C. Thomas, Springfield IL. pp.115-116

INTERVIEWING A PERSON ABOUT A PROBLEM - SAMPLE QUESTIONS

Session 4: Talking about Internal Barriers

Instructions:

Use this handout to interview a co-worker, who will play the role of a client with a problem. The purpose of this exercise is to expose you to ways to examine the affects and roots of a client's problems and to develop strategies to overcome them.

Addressing the Problem

- ? Would it be all right with you if I asked you some questions about this problem? (Note: If the client says "I don't

know," try asking how a close relative or friend would answer the question.)

- ? When did the problem first come into your life? What made it easier for the problem to enter at that time?
- ? What are some ways the problem influences your life at this time?
- ? What does the problem get you to do against your better judgement?
- ? What does the problem get you to believe about yourself?
- ? Which of your life circumstances does the problem use to its advantage?
- ? How is this problem affecting your relationships?
- ? If the problem could talk, what kind of life would it say it wants for you?
- ? How much do you want to take back your life from the problem? (on a scale of 0-10, for instance)
- ? How do you feel about the problem's having these effects on you and your life?
- ? What do you call the opposite of the problem? What do you think would be the strongest force or weapon against it?

Collecting Anti-Problem Knowledge

- ? What areas of your life have you taken control over despite the problem?

- ? What effective counter-measures have you taken against the problem?
- ? What special qualities, skills, and knowledge do you possess that can overcome this problem?
- ? What purposes, values and commitments guide you through your battle with this problem?
- ? What are the problem's weaknesses and vulnerabilities?
- ? Who are your allies against the problem?
- ? What are other options available to you to combat the problem? For instance, if you were going to create an "Anti-Problem Campaign," whom would you want to join? What might you be asking them to do? What else might you need to make the Campaign a success?

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Session 5: Introduction to Goal Setting
What Kinds of Goals Contribute to Client Success?
(2:45 - 3:45)

Introduction:

Goal setting is often treated as an accounting practice of simply identifying where a client is and where that client wants to go. But effective goal setting is much more complicated than this. What people often fail to appreciate in case management is that the chances for a client's success are heavily dependent on the successful formulation of their goals.

Goals are the key to successful motivation, but only if these goals have the characteristics of a well-formed and thoroughly imagined outcome. Goal setting is often based on a balance between what clients think they want to achieve and what the case manager thinks is appropriate, realistic, and sustainable. This session of the training will introduce you to effective strategies to form meaningful goals that are achievable, measurable, and relevant to the pursuit of self sufficiency.

Goal: Enhance the case management skills and practices of the MTW/FSS caseworkers.

Objectives:

Upon completion of this section, trainees will be able to:

- Name the characteristics of a well-developed goal.
- Use a simple checklist to evaluate their current goal-setting practices.
- Use questions to develop a short-term goal.

Session Activities:

- General Overview of Goal Setting
- Group Discussion
- *Questioning for a Well Formed Goal* Exercise
- *Is My Goal Well Developed* Exercise

QUESTIONING FOR A WELL-FORMED GOAL

Session 5: Introduction to Goal Setting

Instructions:

Use this handout to practice developing goals for your clients. This handout outlines the criteria of well-formed goals; key words to use when helping clients develop their goals; and sample questions. To help you apply these goal-formation strategies to your work, try to develop a short term, measurable goal for one of your clients, with whom you will meet in the near future.

| CRITERIA | KEY WORDS | SAMPLE QUESTIONS |
|--------------------------|------------------------|--|
| In the Positive | "Instead" | "What will you be doing instead?" |
| In a Process Form | "How" | "How will you be doing this?" |
| As Specific as Possible | "Specifically" | "How specifically will you be doing this?" |
| In the Client's Control | "You" | "What will you be doing when that happens?" |
| In the Client's Language | Use the client's words | |
| Measurable | "What," "When" | "What will tell us that you are doing this?" |

From *Becoming Solution-Focused in Brief Therapy* by John Walter and Jane Peller (1992). Brunner Mazel: New York

IS MY GOAL WELL-DEVELOPED?

Session 5: Introduction to Goal Setting

Instructions:

Using this checklist, examine some of your own clients' goals and assess if they meet the following qualities of well-developed goals. If your clients' goals do not meet these qualities, think about how you could modify or change them to meet these qualities.

Qualities of Well-Developed Goals:

- ☐ It is important to the client.
- ☐ It is as specific as possible.
- ☐ It is realistically achievable.
- ☐ It is positively-stated as the presence, rather than the absence, of something.
- ☐ It is stated in the client's language.
- ☐ It is described as the beginning of a new behavior, not an end of undesirable behavior.
- ☐ It is viewed as taking a lot of "hard work" by the client.
- ☐ It is in the client's control.
- ☐ It can be measured easily.

Notes:

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| |
|---|
| <p style="text-align: center;">Summary Discussion and Wrap Up (3:45 - 5:00)</p> |
|---|

Introduction:

The purpose of the summary discussion and wrap up is to combine all of the issues and lessons covered throughout the day into a unified picture of casework. The trainers will recap the day's activities, summarize the major points and lessons of the training, and solicit questions and feed back from the participants.

Session Activities:

- Participant Reflections on the Day's Activities
- Summary of Lessons Covered
- Discussion of *Workshop Summary Points*
- Questions and Feedback

WORKSHOP SUMMARY POINTS

Below is a list of the main points covered in today's caseworker training. You may find it helpful to place a check next to the points that you understand. Then, if any boxes remain unchecked, please ask your trainer to clarify the point.

- ☐ A collaborative, strengths-based approach to casework and case management enhances the working alliance between client and worker.
- ☐ A successful journey from dependency to self-sufficiency depends upon the combined efforts of the client and the caseworker in a strong collaborative relationship.
- ☐ The primary goal of a case manager is to enable a client to use help effectively.
- ☐ The major roles of a case manager are to: a) Help clients overcome their barriers to using resources, and b) Connect the client to both external and internal resources.
- ☐ A holistic assessment recognizes that problems and solutions exist within a network of needs and resources.
- ☐ In case assessment, clients' self-sufficiency needs are balanced between resources and barriers that are both external and internal.
- ☐ Internal resources are powerful tools that can drive a client's self-sufficiency journey.
- ☐ Clients' internal resources are accessible through conversations or questions that draw on their values, beliefs, hopes and dreams.
- ☐ Patterns of behavior, shaped by past experiences, (Generalization) can produce internal barriers that

constrain a client from seeking, accepting or using resources.

- Caseworkers can combat clients' internal barriers through conversations that separate the person from the problem.
- Well-developed goals are specific, achievable, measurable, appropriate to self sufficiency, important to the client, and in the client's own language.

Summary Discussion and Wrap Up

Notes:

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Training Sessions - Day Two

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| <p style="text-align: center;">Welcome and Introduction (8:45 - 9:05)</p> |
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Introduction:

To start the second day, we orient the new members by describing the goals and objectives of the training. We will briefly go over what has happened so far in the training and provide an outline for the day's activities. Finally, we will introduce the concept of a holistic organization to start the day's activities.

Session Activities:

- Introductions
- Description of What Has Happened in the Training So Far
- Outline of the Days Activities
- Description of a Holistic Organization

Notes:

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| Session 6: MTW/FSS Overview and Small Group Break Out (9:05 – 10:30) |
|---|

Introduction:

The interconnectedness of the HPHA departments is the focus of this training session. In a large organization with multiple departments, staff can easily become so engrossed in their own work that they forget about the broader goals of the organization. In HPHA's case, one of these goals is to help residents become self sufficient, and all HPHA staff are, in some way, connected to this pursuit.

This training session is an opportunity for you to step back from your own individual work and gain a more holistic perspective of why your work matters to the overall mission of the organization. In this session, we will demonstrate why it is important to know the staff in the other departments and the roles that they play in HPHA's work.

Goals:

- Increase staff understanding of HPHA's work as a holistic system, particularly in regards to the MTW/FSS program.
- Improve communication and collaboration between HPHA departments in the delivery of self sufficiency services to clients.

Objectives:

Upon completion of this section, you will be able to:

- Understand the purpose, history, and key procedures of the MTW/FSS program.
- See the interconnectedness of each department in HPHA's self sufficiency work.

Session Activities:

- *When I Joined HPHA* Exercise
- Overview of the MTW/FSS Program
- *The Inside Story* Exercise

WHEN I JOINED HPHA

Session 6: MTW/FSS Overview and Small Group Break Out

Instructions:

For this exercise, pair up with a co-worker, who you do not know well, and tell your partner about an experience from your first days as an HPHA employee. Once all the pairs are finished talking, introduce your partner to the larger group by retelling the story that you just heard.

Please answer the following questions and address your answers to your partner:

- ? What was your first job at HPHA?
- ? How many years have you worked at HPHA?
- ? What do you remember about your first experience as an HPHA employee?

When you are finished, be prepared to introduce your partner to the group by retelling the story that you just heard.

THE INSIDE STORY

Session 6: MTW/FSS Overview and Small Group Break Out

Instructions:

For this exercise, join the members of your own department. On a poster sheet, create pictures and/or statements with your group of what you do as individuals in your department and as a team together. After your small group is finished, be prepared to present your poster to the larger group. Think about the following issues as you create your poster:

- ? What service do you provide to residents? What is the nature of your work with residents?
- ? What is the purpose of your department?
- ? What would you like people in other departments to know about your work?

Notes:

[illegible]

| |
|---|
| <p>Session 7: Self Sufficiency Mapping Exercise (10:45 - 11:30)</p> |
|---|

Introduction:

In this session, we reinforce the concept of HPHA as a holistic system of several departments that share common goals and challenges. The *Self Sufficiency Mapping Exercise* will allow you to see how your work relates to the work of others and ultimately to the pursuit of HPHA's mission. Using the posters created in the previous session, we will draw connections between each of the departments to represent the holistic nature of HPHA's self sufficiency work.

Goals:

- Increase staff understanding of HPHA's work as a holistic system, particularly in regards to the MTW/FSS program.
- Improve communication and collaboration between HPHA departments in the delivery of self sufficiency services to clients.

Objectives:

Upon completion of this section, you will be able to:

- Describe the role each department plays to help residents achieve their self sufficiency goals.
- Understand the client's process to achieve self sufficiency from the application stage to economic independence.

Session Activities:

- Trainers Map the Self Sufficiency Journey Using Posters
- Group Discussion

Session 7: Self Sufficiency Mapping Exercise

Notes:

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| <p style="text-align: center;">Session 8: Work Stories Activity (11:30 - 12:00)</p> |
|---|

Introduction:

In this session, we attempt to strengthen the level of communication between the different HPHA departments through individual, staff work stories. While this activity lasts for only 30 minutes, we encourage you to use this exercise as a catalyst for continued dialogue with different HPHA departments. Through this exercise, we stress the value of communication, as a means to improve job performance, professional and personal development, and morale.

Goals:

- Increase staff understanding of HPHA's work as a holistic system, particularly in regards to the MTW/FSS program.
- Improve communication and collaboration between HPHA departments in the delivery of self sufficiency services to clients.

Objectives:

Upon completion of this section, you will be able to:

- Better understand the work of departments, other than their own.
- Describe the role each department plays in the achievement of self sufficiency goals of residents.
- Identify the common goals and challenges of each department.

Session Activities:

- *A Story of My Job* Exercise
- Large Group Discussion

A STORY OF MY JOB

Session 8: Work Stories Activity

Instructions:

For this exercise, join a small group of 4 – 6 participants and follow the instructions below:

- Please recall a personal story about working with an HPHA resident and think about the challenges, rewards, obstacles, and resources that you faced during the interaction.

- Tell the story to your group.

- After each member of your group tells a story, select one story to tell to the larger group.

Notes:

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| <p style="text-align: center;">Large Group Summary and Wrap Up (12:00 - 12:15)</p> |
|--|

Introduction:

During this final session, we will summarize the day's activities, reiterate the value in viewing HPHA as a holistic system, and reemphasize the importance of internal communication among HPHA's departments. This wrap up session is also an opportunity for you to ask questions, or make a comment about your experience with the training. Once the training is completed, we will distribute an evaluation sheet, so you can assess the training and provide any additional feedback to us.

Session Activities:

- Summary of Day's Activities
- Reiteration of Major Themes of Training
- Questions and Feedback
- Completion of Training Evaluation Form

Notes:

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| <p>Final Wrap Up with Core Participants (12:25 - 1:00)</p> |
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Introduction:

In this final wrap up session, trainers summarize lessons learned throughout the two-day training and answer any questions, clarify any issues, and solicit feedback from the audience. The trainers address the major themes of case assessment, goal setting, holistic work, and interdepartmental communication, and illustrate the interconnected nature of these themes in self sufficiency work. Finally, the trainers will close the training for the core participants and wish them luck as they incorporate the lessons they learned in their daily work lives.

Session Activities

- Summary of Overall Training Lessons
- Final Questions and Feedback
- Training Wrap Up

Notes:

Reference Material

STAGES OF CASE MANAGEMENT

The goal of case management is to enable the client to use help effectively.

The main role of the case manager is to overcome clients' barriers to using resources and to make connections between the client and helping resources.

| Stage | Tasks |
|---------------------|--|
| 1. Engage | <ul style="list-style-type: none">▪ Build trust and working relationship▪ Handle clients' negative feelings▪ Clarify role expectations. Determine who will do what. |
| 2. Assess | Elicit accurate information about: <ul style="list-style-type: none">▪ Client's situation▪ Client's problems▪ Client's resources (external and internal)▪ Client's barriers to using the resources |
| 3. Plan | <ul style="list-style-type: none">▪ Formulate goal or goals▪ Set priorities among the goals▪ Choose methods to achieve goals▪ Identify times and procedures for evaluating progress |
| 4. Access Resources | <ul style="list-style-type: none">▪ Access external resources▪ Access internal resources▪ Connect client with resource▪ Negotiate client's use of resource▪ Advocate - Use influence to obtain help for client▪ Motivate Client |

| | |
|----------------------|--|
| 5. Coordinate | <ul style="list-style-type: none"> ▪ Get agreement with goals and the plans to achieve those goals ▪ Secure cooperation ▪ Inform helping network of changes ▪ Support members of the helping network |
| 6. Disengage | <ul style="list-style-type: none"> ▪ Evaluate progress and/or achievement of goals ▪ Say "goodbye" - Celebrate success |

ACTIVE LISTENING TECHNIQUES

| TYPE OF STATEMENT | PURPOSE | TO ACHIEVE PURPOSE | EXAMPLES |
|--------------------|--|---|--|
| ENCOURAGING | <ul style="list-style-type: none"> To convey interest To keep the person talking | <ul style="list-style-type: none"> Don't agree or disagree Use noncommittal words with positive tone of voice | <ul style="list-style-type: none"> "I see ..." "Uh-huh ..." "That's interesting..." |
| RESTATING | <ul style="list-style-type: none"> To show that you are listening and understand To let the person know your grasp the facts | <ul style="list-style-type: none"> Restate the other's basic ideas, emphasizing the facts | <ul style="list-style-type: none"> "If I understand you correctly, your idea is ..." "In other words, this is your decision ..." "What I hear you saying is..." |
| REFLECTING | <ul style="list-style-type: none"> To show that you are listening and understand To let others know you understand their feelings | <ul style="list-style-type: none"> Restate the other's basic feelings | <ul style="list-style-type: none"> "You feel that ..." "You were pretty disturbed by this" |
| SUMMARIZING | <ul style="list-style-type: none"> To pull important ideas, and facts together To establish a basis for further discussion To review progress | <ul style="list-style-type: none"> Restate, reflect, and summarize major ideas and feelings | <ul style="list-style-type: none"> "These seem to be the key ideas you have expressed ..." "If I understand you,... " You feel this way about the situation." |

| | | | |
|--------------------|--|---|--|
| VALIDATING | <ul style="list-style-type: none"> ▪ To let others know you understand | <ul style="list-style-type: none"> ▪ Express the meaning you are making | <ul style="list-style-type: none"> ▪ " That makes sense to me because..." |
| EMPATHIZING | <ul style="list-style-type: none"> ▪ To connect with others on an emotional level | <ul style="list-style-type: none"> ▪ Express the feelings you recognize in the other | <ul style="list-style-type: none"> ▪ " I can imagine you might be feeling..." |

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MULTIPLE BARRIERS

- People with multiple barriers are more likely to receive welfare for extended periods of time. During a two-year period, more than 50 percent of those who received welfare for longer than one-and-a-half years had multiple barriers; in contrast, only 5 percent of those who received welfare for less than six months had multiple barriers (Pavetti 1995).
- Long-term welfare recipients (five years or more) are more likely to have severe barriers to employment than are short-term welfare recipients (less than two years)--54 percent, compared to 40 percent (Olson and Pavetti 1996).
- Welfare recipients with multiple barriers are less likely to maintain continuous employment throughout a given year. Only 7 percent of welfare recipients with severe multiple barriers to employment worked continuously during a given year, compared with 25 percent of welfare recipients without severe multiple barriers to employment (Olson and Pavetti 1996).

RESOURCE INVENTORY FORM (EXAMPLE)

| Client Needs | Internal Resources | External Resources |
|--------------|--------------------|--------------------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |

Training Evaluation Form

Training Evaluation Form

Your feedback is very important to help us improve the quality of this training. Your responses will be kept confidential. Please return this form to your trainer. Thank you!

| | Poor Excellent | | | Satisfactory | |
|--|-------------------|---|---|--------------|---|
| Training Quality | | | | | |
| 1. The overall quality of the training I have received was... | 1 | 2 | 3 | 4 | 5 |
| 2. The relevance of the training to my needs is... | 1 | 2 | 3 | 4 | 5 |
| Quality of Trainers | | | | | |
| 3. The overall effectiveness of the trainers was.... | 1 | 2 | 3 | 4 | 5 |
| 4. The ability of the trainers to convey & explain the material was... | 1 | 2 | 3 | 4 | 5 |
| Presentation | | | | | |
| 5. The topics covered in the training were... | 1 | 2 | 3 | 4 | 5 |
| 6. The training exercises were... | 1 | 2 | 3 | 4 | 5 |
| Course Objectives | | | | | |
| 7. The stated objectives of the training were... | 1 | 2 | 3 | 4 | 5 |
| 8. The length of the training was... | 1 | 2 | 3 | 4 | 5 |
| 9. The course delivery method was... | 1 | 2 | 3 | 4 | 5 |
| Materials | | | | | |
| 10. The course materials (worksheets, handouts, etc.) were... | 1 | 2 | 3 | 4 | 5 |

The greatest strength(s) of the course is/are: _____

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The course could be improved by: _____

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Any other comments: _____

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Please use the back of this form for any additional comments.